



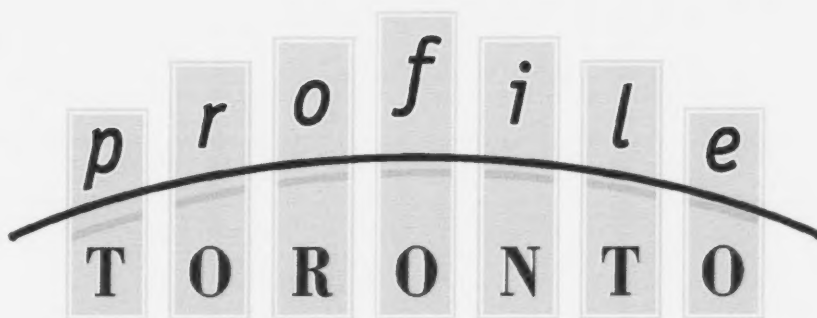
This bulletin summarizes the highlights of the 2011 City of Toronto annual Employment Survey, marking its 29th consecutive year.

This information resource presents a picture of change in Toronto's economy throughout the past three decades.

For more information, please visit us at www.toronto.ca/demographics/surveys

Highlights

- Toronto's overall employment in 2011 was 1,317,300, up by 1.5% or 19,000 jobs from 2010, by comparison to 1.3% nationally. The number of establishments grew by 1,500 or 2% to 75,100.
- Full-time employment has continued to stay above the 1 million mark for the fifth year with 1,024,200 employed full-time. This is a 0.9% increase in full-time employment while part-time employment grew faster with a 3.3% increase from 2010.
- The largest share of jobs is found in the Office sector (47.7%), followed by the Institutional (16.7%), Service (11.8%), Retail (10.7%), Manufacturing (9.8%) and Other (3.3%), reflecting the diverse nature of Toronto's economy.
- Employment in all employment sectors saw an increase in employment with the exception of the Manufacturing sector. The Other sector had the greatest growth at 8.4% over 2010.
- Employment in the Downtown and Centres has grown by 11.4% or 53,200 jobs since 2006; 46,800 jobs were added to the Downtown (11.8%) and 6,100 jobs were added in North York (20.1%).
- Some 4,700 business establishments were new to the City in 2011. The Office sector continues to dominate with 37.8% of all new establishments, comprised primarily of law offices, parole/security services and health service practitioners. The Service and Retail sectors were also well represented, comprising 23.7% and 16.9% of new establishments respectively.
- Of the 4,700 new establishments, 57.4% are located within the Downtown, Centres and Employment Districts, up from the 53.2% observed in 2010.



May 2012

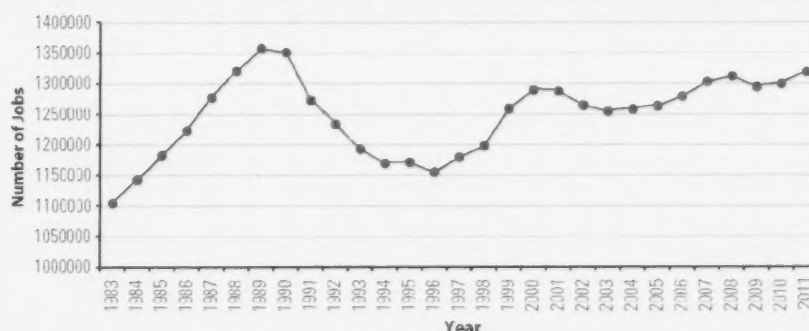
Toronto Employment Survey 2011

1. Overview

This bulletin summarizes the results of the 2011 Toronto Employment Survey undertaken in the summer of 2011, by highlighting the key findings and trends pertaining to employment by sector, the longevity of establishments, and emerging patterns in the Centres, Downtown and Employment Districts. The results from the Employment Survey are used to gauge the City's economic and investment health and to monitor the progress of the Official Plan policies. It also is used in proactive policy development for decision making, as an aid in labour force development efforts, and to provide background information for forecasting and the planning of City infrastructure and services. This annual survey offers timely insight into the business climate across Toronto to facilitate, accelerate and achieve economic growth (see Figure 1).¹

Toronto's economy has performed well. The recovery from the impacts of the global recession continues, with employment topping 1.3 million jobs on the net addition of 19,000 jobs since 2010. The City experienced a 1.5% increase in employment this past year, matching the nation's growth rate and slightly below that of Ontario at 1.8%.² The growth of the City's Gross Domestic Product (GDP) has expanded from 1.1% in 2009/10 to 1.8% in 2010/11. Total wages and salaries rose by 2.2% in 2009/10 and more strongly by 3.4% in 2010/11. At the same time, the City's unemployment rate crested its recent peak of 10.0% in 2008, easing down to 9.2% in 2011.³ These numbers, while seemingly modest, are quite robust in a current global environment of countries defaulting on their debt and facing massive current unemployment and with further cuts in spending to come.

Figure 1: Total Employment, City of Toronto, 1983-2011



¹ All data in this Bulletin are from the Toronto Employment Survey unless otherwise indicated.

² Conference Board of Canada, Metropolitan Outlook 1: Economic Insights Into 13 Canadian Metropolitan Economies, Spring 2012.

³ City of Toronto, Economic Development and Culture Division, Strategic Growth and Sector Development Section.

Map 1: 2011 Employment Concentration, City of Toronto

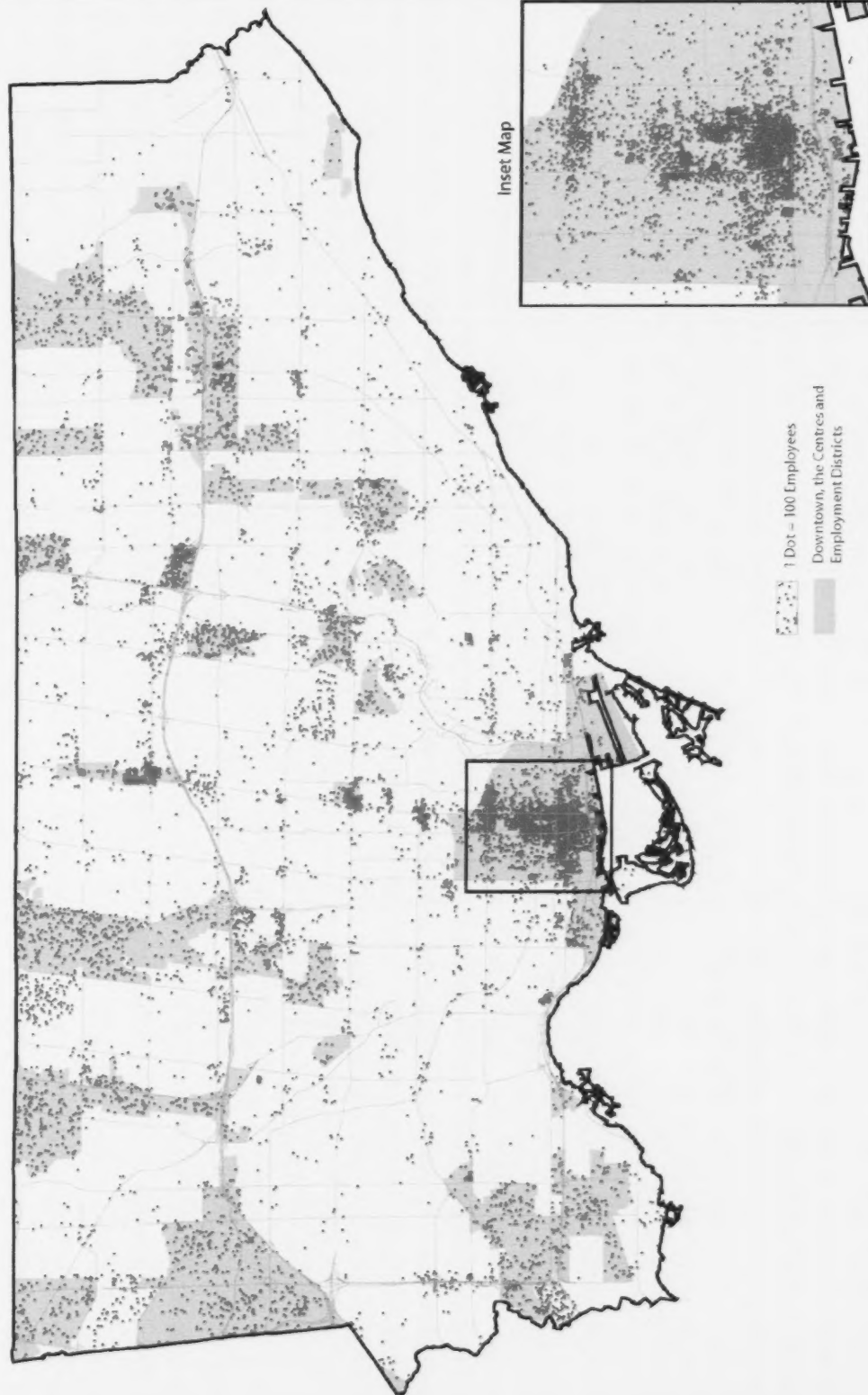


Table 1: Total Employment, 2001, 2010, 2011*

Employment	Total Number of Employees			Net Change	Growth Rate %	Net Change	Annual Growth Rate %
	2001	2010	2011				
Full-time	1,017,800	1,014,600	1,024,200	6,400	0.6%	9,600	0.9%
Part-time	268,500	283,700	293,100	24,600	9.2%	9,400	3.3%
Total	1,286,300	1,298,300	1,317,300	31,000	2.4%	19,000	1.5%

* Numbers have been rounded to the nearest hundred.

Figure 2: Full-time and Part-time Employment, City of Toronto, 2001-2011

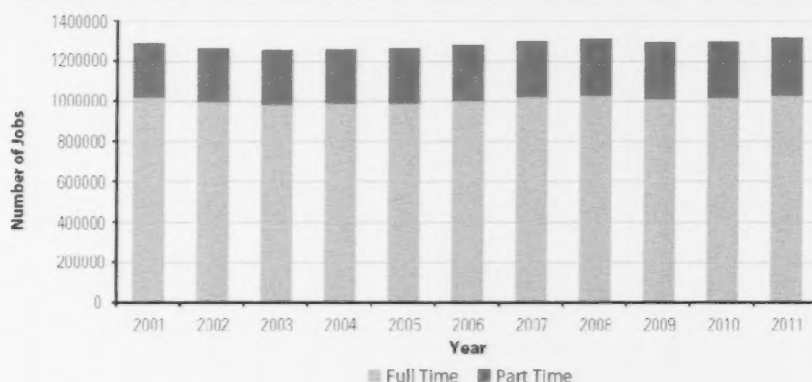


Figure 3: Sectoral Changes Over Time, 2001, 2006, 2011

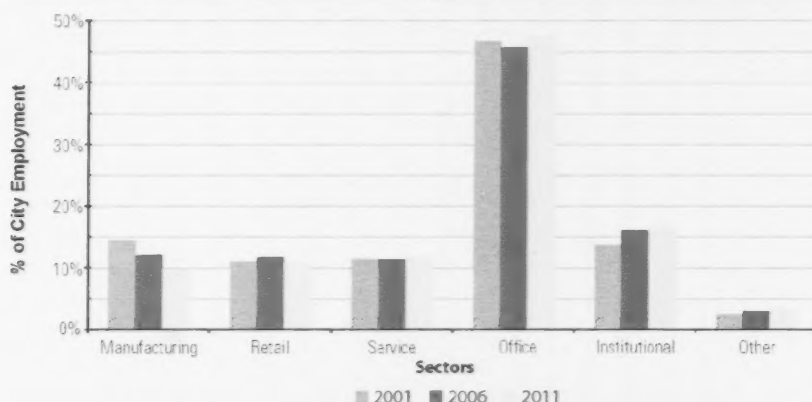


Table 2: Employment by Sector*

Employment	Total Number of Employees				Net Change	Growth Rate %	Net Change	Growth Rate %	Net Change	Growth Rate %
	2001	2006	2010	2011						
Manufacturing	186,800	155,200	129,500	128,600	-58,200	-31.2%	-26,600	-17.1%	-900	-0.7%
Retail	142,600	149,800	140,500	141,600	-1,000	-0.7%	-8,200	-5.5%	1,100	0.8%
Service	146,800	145,500	150,900	155,500	8,700	5.9%	10,000	6.9%	4,600	3.0%
Office	601,500	584,200	623,300	627,900	26,400	4.4%	43,700	7.5%	4,600	0.7%
Institutional	176,400	205,500	213,500	219,800	43,400	24.6%	14,300	7.0%	6,300	3.0%
Other	32,300	38,000	40,500	43,900	11,600	35.9%	5,900	15.5%	3,400	8.4%
Total	1,286,400	1,278,200	1,298,200	1,317,300	30,900	2.4%	39,100	3.1%	19,100	1.5%

* Numbers have been rounded to the nearest hundred. Totals may differ from sum of full-time and part-time employment.

Map 1 shows the distribution of employment across the City, with distinct concentrations in the Downtown, Centres and Employment Districts, demonstrating their continued vitality.

Over the past decade, the City's total employment has gradually risen, up 31,000 or 2.4% over 2001 (see Table 1 and Figure 2). Full-time employment has shown a very small increase of 0.6% or 6,400 jobs. The majority of employment increase occurred in part-time employment with an increase of 9.2% or 24,600 jobs. Part-time employment represents 4 out of every 5 net new jobs added over the decade. In 2011, part-time employment grew by 3.3% while full-time employment grew by only 0.9%. In the past year, part-time work comprised 22.3% of all jobs, above the average for the decade of 20.9%.

2. Employment by Sector

2001-2011

Changes have continued to take place in the sectors that make up Toronto's economy. The Office sector maintains its lead as the City's largest employment sector at 627,900 jobs in 2011, compared to 601,500 jobs in 2001 or 4.4% growth over the decade. The second largest sector is the Institutional sector which has grown from 13.7% in 2001 to 16.7% in 2011, a gain of 43,400 jobs (see Figure 3 and Table 2).

In contrast, the Manufacturing sector continues to decline, transforming what was Toronto's second largest employment sector into Toronto's second smallest

sector in just 10 years' time. This sector has shrunk from 186,800 employees in 2001 to 128,600 employees, representing 9.8% of total employment in 2011. The Service sector, which is primarily made up of restaurants, auto-related uses and accommodation, grew from 146,800 in 2001 to 155,500 in 2011, while its relative share of total employment remained constant at around 11.8%. Retail sector employment has shown a slight decline of 1,000 jobs or just 0.7% over the decade, and represents 141,600 jobs or 10.7% of the City's employment in 2011. The Other sector, which includes entertainment venues, community and recreation uses, increased to 43,900 jobs or 3.3% of total employment in 2011, in comparison to the 2001 job level of 32,300.

2006-2011

The Office sector continued its rebound from a low of 584,200 employees in 2006, now up to 627,900 employees in

2011, an increase of 43,700 or 7.5%. Retail employment has been trending downward somewhat for the last five years with a decrease of 5,500 or 8,200 jobs since 2006. The Manufacturing sector has continued to decline with a loss of 26,600 jobs or 17.1%.

2010-2011

In 2011, all sectors but the Manufacturing sector saw increases in employment (see Figure 4). The greatest relative increase occurred in the Other sector (entertainment, community and recreation uses) with an increase of 8.4% or 3,400 jobs. The Institutional sector increased the most in absolute numbers, by 6,300 jobs or 3.0%. The Service and Office sectors each grew by 4,600 jobs or by 3.0% and 0.7% of their respective totals in 2011. The Manufacturing sector has once again experienced a decline in employment of 0.7% or 900 jobs. However, its annual decline has slowed over the past two years.

3. Number of Establishments

The number of establishments surveyed in 2011 was 75,100, showing a net gain of 1,500 business establishments since 2010 (see Figure 5). Since the recent high of 75,500 establishments in 2007, the number of establishments had declined during the last few years, which is not surprising given the economic conditions the City – and the world – has experienced since early 2008. The 2.0% increase in establishments since 2010 is higher than the overall 1.5% increase of employment in the City this past year.

The Manufacturing sector saw a modest increase of 2.0% (100 establishments) over 2010. This is the first year since 2007 that an increase has occurred in the sector. The overall decline in Manufacturing establishments reflects a similar decline nationally as the North American economy has continued to shift from a goods-producing economy to a service-based economy. Toronto's progression reflects an evolving urban economy which remains competitive in a changing regional and global market. Still a centre of opportunity and industrial innovation, 6,9% of establishments new to the City in 2011 are in the Manufacturing sector.

Employment in the Office sector has risen strongly and fallen slightly year to year in the last five years, while the number of firms has fluctuated in a similar though more muted pattern. This is due in part to the merging of small and medium-sized office firms, which may require additional locations for operational needs but often shed the post-merger surplus workforce. This is especially common in the Finance, Insurance and Real Estate (F.I.R.E.) sub-sector. The number of establishments in the Office sector grew by 2.5% between 2010 and 2011.

Figure 4: Change in Total Employment by Sector, 2010-2011

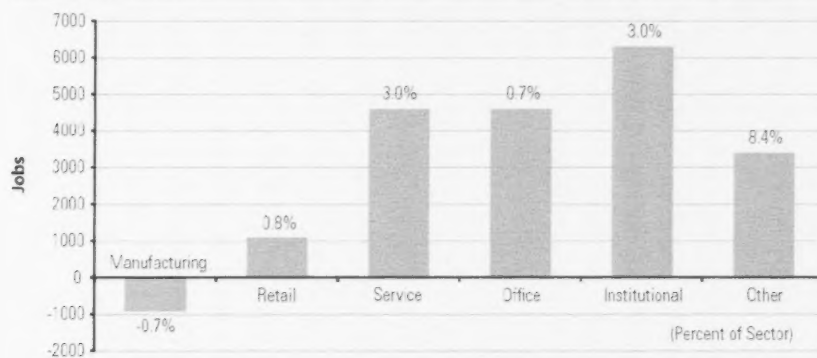
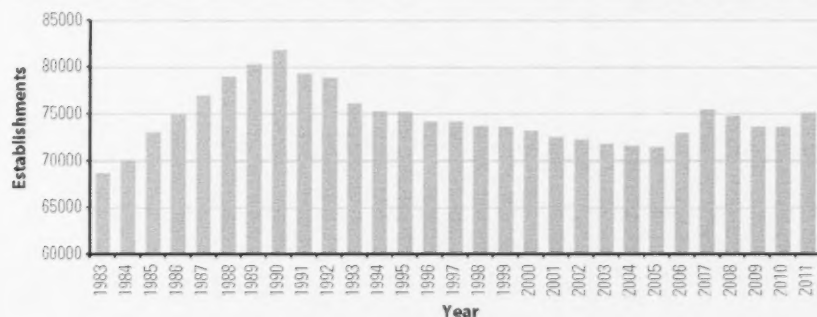


Figure 5: Total Number of Establishments, 1983-2011



The Retail sector lost 1,200 establishments since 2001, declining from 17,200 to 16,000 (see Figure 6). Total retail jobs remained steady in 2011. In 2001, an average Retail store employed 8.3 employees, whereas in 2011, 8.9 employees were employed. This is explained by the continued growth of larger retail formats.

The Service sector increased by 1,100 establishments since 2001 to 17,800, a 6.6% rise. The Institutional sector has posted a net increase of 1,000 establishments representing growth of 22.7% over the decade. The total number of establishments stands at 5,400.

Figure 6: Change in Number of Establishments, 2001-2011



Figure 7: Longevity of Existing Establishments

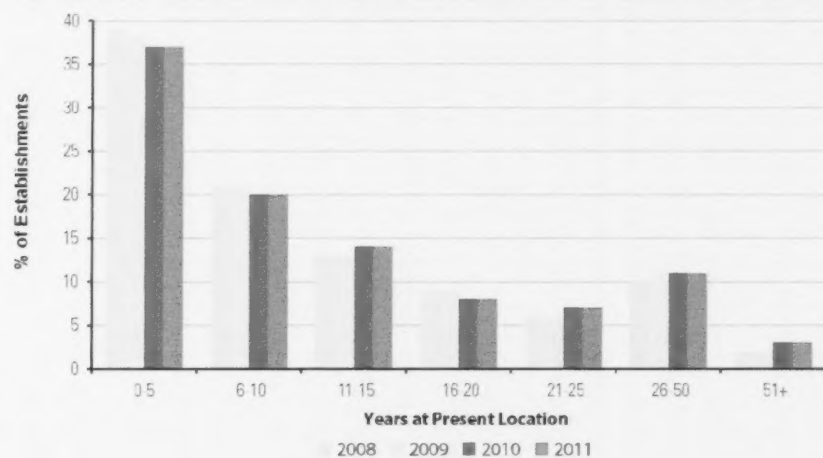


Table 3: New Establishments, 2010-2011

Location	2010	2011	Sector	2010	2011
Centres	170	300	Manufacturing	130	240
Downtown	700	1,130	Retail	680	790
Employment Districts	910	1,260	Service	810	1,110
Rest of the City	1,560	2,000	Office	1,140	1,770
			Institutional	200	200
			Other	380	560
City Total	3,340	4,690	City Total	3,340	4,670

*Totals differ due to rounding to the nearest 10.

Despite the unsettled global economic conditions, Toronto remains an attractive place for new start-ups and relocations from elsewhere. In 2011, businesses that were established in the City within the past 5 years comprised the largest proportion of establishments by length of tenure at 27,700 or 36.9% of total establishments. Only 13.8% have operated at their present location since before 1985 or for 25 years or more (see Figure 7).

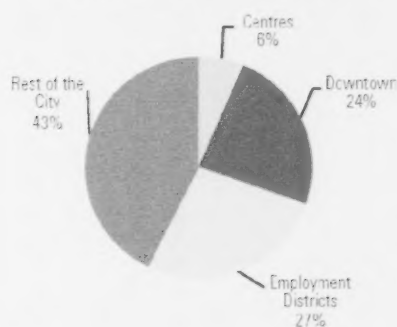
The proportion of establishments in the same location for 5 years or less has declined from 39.4% in 2008 to 36.9% in 2011. The percentage of establishments present between 11 and 15 years in the same location has risen slightly from 12.9% in 2008 to 14.4% in 2011. The proportion of establishments that have been well established in Toronto for sixteen-plus years stands at 28.9%, reflecting the long-run stability of the local economy despite recessions, economic slumps and continued expansion of employment growth in areas outside of the City.

New Establishments in the City

The 2011 Survey identified almost 4,700 establishments that were new to the City over the past year (see Table 3). It should be noted that these establishments were not necessarily all new business start-ups, but also include firms relocating from outside the City or new locations of multi-location firms such as banks and coffee shops.

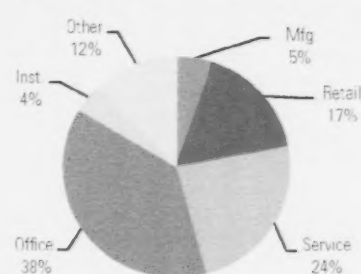
Of the 4,690 newly located establishments, half of these were located in the Downtown and Employment Districts with 1,130 and 1,260 respectively, while 300 were in the Centres and 2,000 were found elsewhere in the City. About 57% of all new establishments in 2011 were located in the Downtown, Centres or Employment Districts, which is higher than the 53% observed in 2010 (see Figure 8 on Page 6).

Figure 8: New Establishments by Location, 2011



Six out of every ten new establishments were in the Office or Service sectors (see Figure 9). The new establishments in the Office sector continue to be largely found in the Business Service sub-sector and the Health Service sub-sector. The former is dominated by law firms and companies that provide security and patrol services while the Health Service sub-sector is dominated by health service practitioners such as chiropractors, physiotherapists and nursing/homecare agencies. In the Service sector, new establishments appeared in a wide range of businesses, including: restaurants and fast food outlets, beauty salons and barber shops, dry cleaners and laundromats, auto body, muffler and transmission services, and gas stations and car washes. Within the Retail sector,

Figure 9: New Establishments by Sector, 2011



clothing, electronics and shoe retailing stores comprised the majority of the new establishments.

4. Downtown and the Centres

Downtown Toronto is the largest employment area in the Greater Toronto Area. The strength of the regional economy is evident by the concentration of jobs in the four Centres designated in the Official Plan. The Downtown and Centres are critical to the City's growth management strategy as attractive mixed use settings for a diverse range of employment and residential growth, making them, and Toronto, a popular place to live, work, and do business.

Map 2 shows the locations and boundaries of the Downtown and the Centres, as outlined in the City's Official Plan.

In 2011, there were approximately 519,200 jobs in Toronto's Downtown and Centres or 39.4% of all jobs (see Table 4). Downtown is the main growth engine that has driven the number of total jobs up by 46,800 over the last five years (see Figure 10). Since 2006, there has been steady growth in all the Centres except for Etobicoke Centre. This hub in particular has experienced a gradual decline in jobs. This is due to a few well established firms going out of business or relocating elsewhere in the City over the past few years. Together, the Downtown and Centres increased by 7,900 jobs or 1.5% over 2010. These vital areas continue to be strong incubators and destinations of new jobs, despite an uncertain period in the global, national and local job markets.

Employment in Downtown and the Centres in 2011 is now 11.4% greater than it was five years ago, an increase of 53,200 jobs. Downtown accounts for most of the net growth, 88% of the total. North York Centre grew by 6,100 jobs since 2006 while Etobicoke Centre lost 1,900 jobs, down 17.8% during the same period (see Figure 11).

Table 4: Total Employment, Centres and Downtown, 2006-2011*

							2006-2011		2010-2011	
	2006	2007	2008	2009	2010	2011	Net Change	% Change	Net Change	% Change
A. Downtown	395,200	415,200	424,900	420,500	432,800	442,000	46,800	11.8%	9,200	2.1%
B. North York Centre	30,400	34,000	34,600	34,700	38,800	36,500	6,100	20.1%	-2,300	-5.9%
C. Yonge-Eglinton	15,800	15,500	15,400	15,500	15,800	16,900	1,100	7.0%	1,100	7.0%
D. Scarborough Centre	14,000	13,000	13,800	14,200	14,700	15,000	1,000	7.1%	300	2.0%
E. Etobicoke Centre	10,700	11,100	10,400	9,900	9,200	8,800	-1,900	-17.8%	-400	-4.3%
Downtown and the Centres	466,000	488,800	499,200	494,700	511,300	519,200	53,200	11.4%	7,900	1.5%
Rest of City	812,000	812,800	811,600	798,500	787,000	798,100	-13,900	-1.7%	11,100	1.4%
City Total	1,278,000	1,301,600	1,310,800	1,293,200	1,298,300	1,317,300	39,300	3.1%	19,000	1.5%

*Numbers rounded to the nearest hundred

Map 2: Downtown and the Centres, City of Toronto

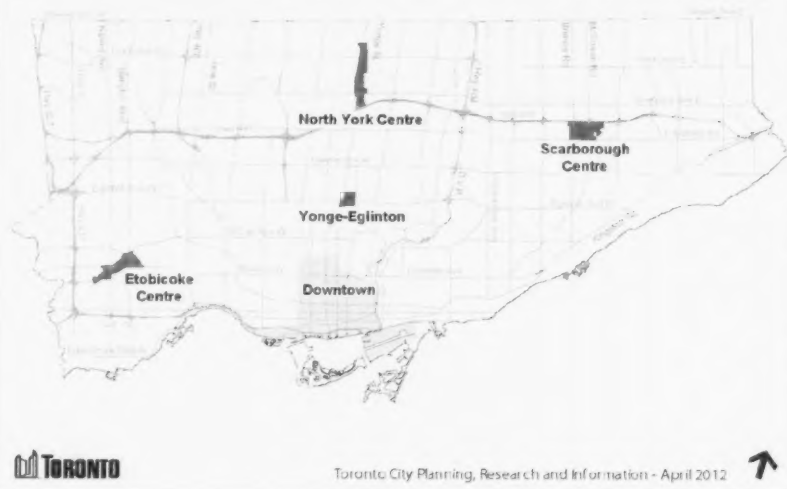


Figure 10: Employment Change in Downtown and Centres 2006-2011

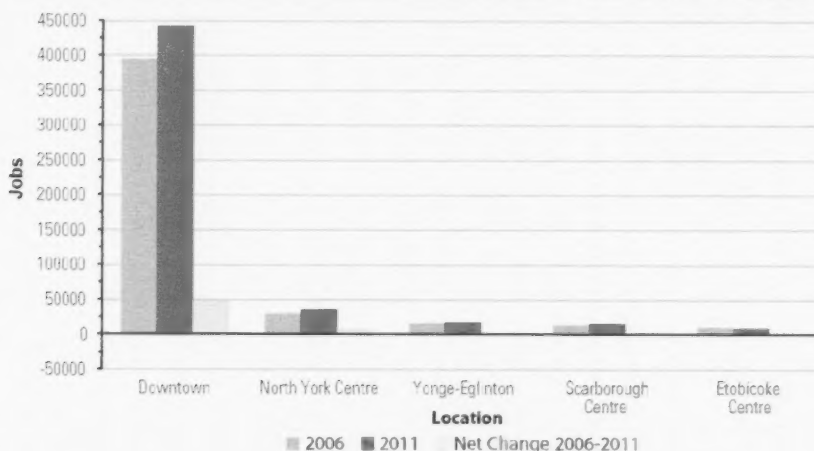
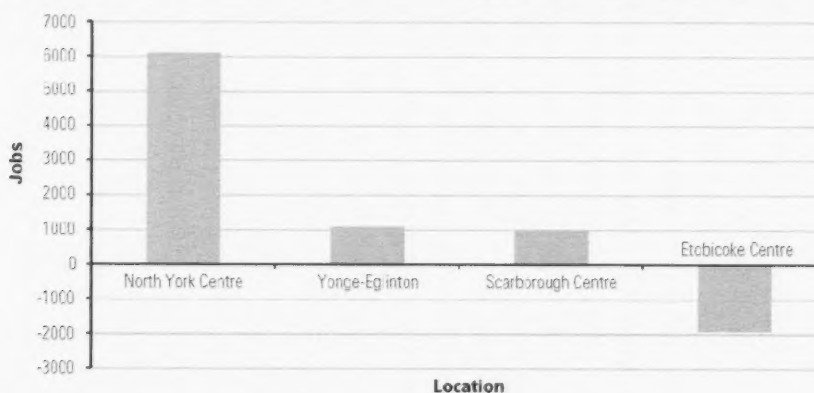


Figure 11: Change in Centres Employment 2006-2011



a Downtown

Downtown is the largest employment cluster in the GTA. Its 442,000 jobs make up one-third of all jobs found in the City. Downtown employment has grown strongly by almost 46,800 jobs over the past five years or 11.8%, and by 9,200 jobs or 2.1% over the past year. It is evident that the Downtown has not only weathered the recession but continues to demonstrate stable employment and intensification. The employment profile of Downtown Toronto is more varied than that of the Centres. Office jobs such as banking services, investment services, Provincial and municipal government, law firms and insurance companies dominate the employment concentration in this area. Office employment is currently 291,600 or 66.0% of the Downtown total. The Office sector has continued to grow, increasing by 18,300 jobs over the past two years. This growth is primarily due to gains in the Government, and Trade/Personal Services sub-sectors such as Provincial government, Retail Trade Administration (Sales Representative, Head Office of Retail Chain), Wholesale Trade Administration and Accommodation, Entertainment and Food Services. Institutional employment is also quite concentrated in the Downtown with 58,400 jobs, primarily in universities, colleges, private and public schools. This sector makes up 13.2 % of all jobs in the Downtown. Employment in the Service sector has also increased, by 4,500 jobs, while the Institutional and Manufacturing sectors both declined by 1,900 and 460 jobs respectively since 2009.

b North York Centre

Total employment is about 6,200 employees more than that recorded in 2006 but down 2,200 from 2010 to 36,500 jobs. About 30,400 of these are Office sector jobs in sub-sectors such as Federal and Provincial governments, investigation services (security guards and patrol services), banking services, and insurance companies. North York Centre accounts for 7.0% of the

employment found in the Downtown and the Centres and is the largest of the four Centres.

c Yonge-Eglinton

Employment has remained relatively stable in this Centre over the last few years until 2011 in which there was an increase of 1,000 jobs. At 16,900 jobs, it accounts for 3.3% of all jobs in the Downtown and the Centres. About 76.9% of the employment is dominated by the Office sector at 13,000 jobs. The Service sector is next largest sector with 1,700 jobs or 10.1%.

d Scarborough Centre

Scarborough Centre's employment increased to 15,000 jobs in 2011, an increase of 300 over 2010. The Office sector, which is the largest sector in

this Centre at 57.6%, experienced an increase of 500 jobs to 8,700 jobs in 2011. The Retail sector is the next largest and is made up of 3,400 jobs or 22.3%. Employment in this Centre makes up 2.9% of all of the employment found in the Downtown and the Centres.

e Etobicoke Centre

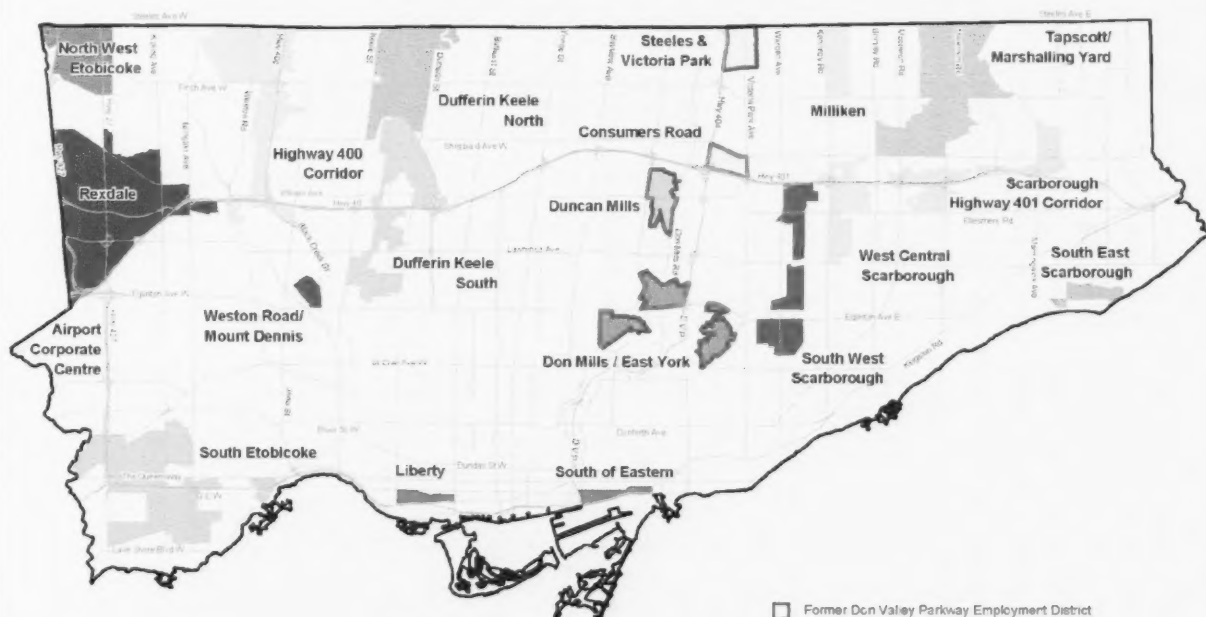
In 2011, the total number of jobs in Etobicoke Centre stood at 8,800, a decrease of 350 jobs or 3.8% from 2010. This decline in jobs is attributed to a number of businesses in the Service, Retail and Institutional sectors downsizing their employment base. This Centre is dominated by the Office sector with 6,300 jobs or 71.0% of Centre employment. The share of total employment in the Downtown and the Centres located in Etobicoke Centre is 1.7%.

5. Employment Districts

The Employment Districts are comprised almost exclusively of employment-related lands, characterized by manufacturing, warehousing and product assembly activities as well as commercial business parks. These are regionally and globally competitive locations for national and international business and as areas for business formation. They provide a broad range of job opportunities for Toronto residents and the regional labour force.

Map 3 shows the locations and boundaries of the 20 Employment Districts identified in the City's Official Plan as structural elements of Toronto's economic future in order to not only ensure a stable environment for investment but also to maintain and grow the City's revenue base. In 2011, there were approximately 356,900 jobs

Map 3: Employment Districts, City of Toronto



Toronto City Planning, Research and Information - April 2012



Table 5: Total Employment, Employment Districts, 2006-2011**

	2006	2007	2008	2009	2010	2011	2006-2011		2010-2011	
							Net Change	% Change	Net Change	% Change
1. South Etobicoke	42,300	43,200	44,000	43,200	41,000	39,900	2,400	5.7%	1,100	2.7%
2. Rexdale	48,200	46,600	47,100	44,700	40,000	39,000	-9,200	-19.1%	-1,000	-2.5%
3. Highway 400 Corridor	35,500	35,300	34,200	32,400	31,500	32,800	-2,700	-7.6%	1,300	4.1%
4. Dufferin Keele North	30,900	31,200	30,800	29,500	31,500	32,400	1,500	4.9%	900	2.9%
5. Tapscott Marshalling Yard	33,000	31,600	31,300	30,300	30,400	30,900	-2,100	-6.4%	500	1.6%
6. Dufferin Keele South	26,800	26,500	26,100	24,300	24,000	24,600	-2,200	-8.2%	600	2.5%
7. Don Mills / East York *	27,100	23,700	23,700	21,800	22,900	22,000	-5,100	-18.8%	-900	-3.9%
8. South West Scarborough	18,300	19,400	19,200	17,800	18,000	19,000	700	3.8%	1,000	5.5%
9. Consumers Road *	16,100	17,000	17,800	19,800	19,000	18,100	2,000	12.4%	-900	-4.7%
10. Duncan Mills *	17,500	17,400	17,800	17,800	17,900	17,600	100	0.6%	-300	-1.7%
11. Scarborough Hwy 401 Corridor	18,000	18,600	18,100	17,500	16,100	16,700	-1,300	-7.2%	600	3.7%
12. West Central Scarborough	17,400	16,500	16,600	15,100	15,500	15,400	-2,000	-11.5%	-100	-0.6%
13. North West Etobicoke	13,800	14,200	13,600	13,200	12,800	12,800	-1,000	-7.2%	0	0.0%
14. Steeles / Victoria Park *	16,500	13,800	14,100	13,300	12,400	12,500	-4,000	-24.2%	100	0.8%
15. Liberty	6,600	7,800	7,300	7,700	7,600	8,100	1,500	22.7%	500	6.5%
16. Milliken	7,300	7,400	7,000	7,100	7,100	7,400	100	1.4%	300	4.2%
17. South of Eastern	7,100	6,200	5,500	5,100	4,700	4,000	3,100	43.7%	700	14.9%
18. Weston Road / Mount Dennis	1,000	1,100	1,000	1,700	1,700	1,700	700	70.0%	0	0.0%
19. Airport Corporate Centre	800	1,000	1,100	1,100	1,000	1,100	300	37.5%	100	10.0%
20. South East Scarborough	1,200	1,100	1,000	1,000	1,000	900	-300	-25.0%	-100	-10.0%
All Employment Districts	385,400	379,600	377,300	364,400	356,100	356,900	-28,500	-7.4%	800	0.2%
Rest of the City	892,600	922,000	933,500	928,800	942,200	960,400	67,800	7.6%	18,200	1.9%
City Total	1,278,000	1,301,600	1,310,800	1,293,200	1,298,300	1,317,300	39,300	3.1%	19,000	1.5%

** Numbers have been rounded to the nearest hundred. Districts are in descending order by size of employment base.

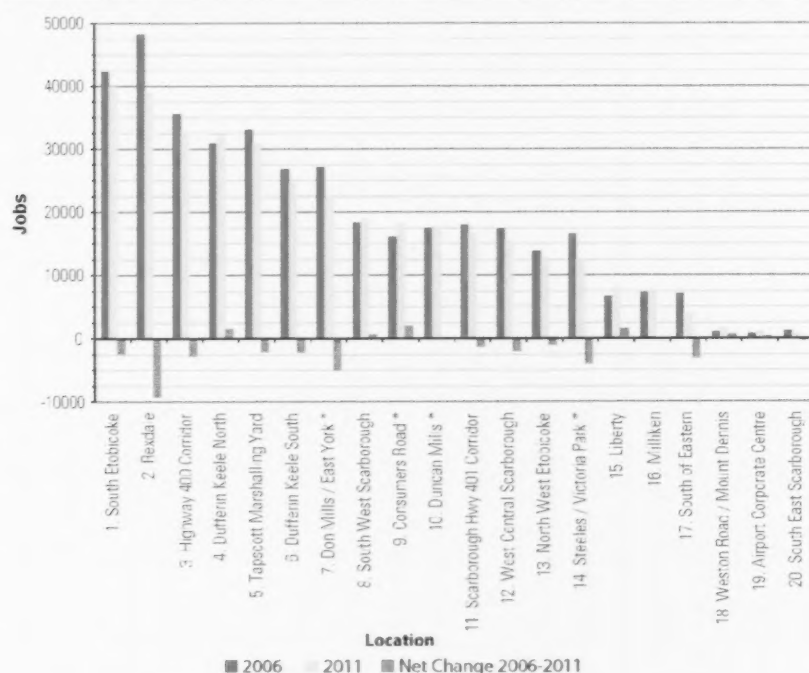
* Formerly part of the Don Valley Parkway Corridor Employment District.

Figure 13: Total Employment in the Downtown and Centres by Six Sectors, 2006-2011


in Toronto's 20 Employment Districts or 27.1% of all jobs in the City (see Table 5 and Figure 13). Ten of these Districts posted increases in jobs over 2010, while eight Districts showed a decrease and two Districts showed no change. In order to provide a more detailed analysis, the largest district (the Don Valley Parkway Corridor) was broken down into four new subareas for the first time this year.

Since 2006, overall employment in all Employment Districts dropped by 7.4%,

Figure 14: Employment Change in Employment Districts 2006-2011



* Formerly part of the Don Valley Parkway Corridor Employment District

a decline of 28,500 jobs (see Figure 14). In 2011, sectoral employment across all the Districts fluctuated slightly. The Office sector within the Employment Districts experienced a net loss of 2,300 jobs since 2010 while the Institutional sector lost 200 jobs. The Other sector gained 1,000 jobs over 2010.

The following section presents trends of Employment Districts in descending order of employment base.

1 South Etobicoke

South Etobicoke is the largest Employment District in Toronto. It is home to 39,900 jobs comprising 11.2% of all Employment District jobs in the City. From 2006 to 2011, there was a decrease of 2,400 jobs or 5.7% in the District. This decrease was due to a decline in the Office sector of 2,700 jobs or 19%. In 2011, the District saw a loss of 1,100 jobs. The office sector declined with 1,900 jobs lost this year, in addition to the 1,800 lost in the previous

year. For the first time since 2007 the Manufacturing sector has increased 2.6%. The Other sector saw an increase of 600 jobs.

2 Rexdale

Rexdale is home to 39,000 jobs or 10.9% of the total employment found in the Employment Districts, and is dominated by both Office and Manufacturing. Since 2006, this District has shrunk by 19.1%, losing 9,200 jobs. The loss of these jobs has been predominantly due to some major employers in this District shedding employment but staying in the District. As well, a couple of large firms have moved outside of the City while a few mid-sized firms have also gone out of business. Employment in Rexdale decreased by 2.5% in 2011, resulting in a loss of 1,000 jobs. In 2011, the downward trend in the Office sector is slowing with a loss of 400 jobs or 3.0%, while the Manufacturing sector experienced a modest loss of 100 jobs, a 0.9% decrease.

3 Highway 400 Corridor

The Highway 400 corridor contains 32,800 jobs or 9.2% of the total employment found in the Employment Districts. The District had been steadily trending downward for the last few years with a loss of 4,000 jobs between 2006 and 2010. In 2011, the District turned the corner with an increase of 4.1% or 1,300 jobs, the first increase in 5 years. The net loss since 2006 is 2,700 jobs or 7.6%. Almost half of the jobs in the District are in the Manufacturing sector with 15,800 jobs or 48.2%. This sector in turn is dominated by the Processed Goods and Product Assembly sub-sectors which make up half of the Manufacturing jobs in the District. The Office sector grew by 11.6% or 900 jobs in 2011, making it the second largest source of employment in the District (26.2%).

4 Dufferin Keele North

This District contains 32,400 jobs or 9.1% of all jobs in the Employment Districts. Employment increased by 900 jobs or 2.9% over the last year and has increased by 1,500 jobs or 4.9% since 2006. The District is led by the Office sector with 13,700 jobs (42.1%) followed by the Manufacturing sector with 9,000 jobs (27.9%). Office employment has grown for the last five years increasing 19.5% or 2,200 jobs while Manufacturing jobs continue to recover from a substantial decline in 2009. The largest sub-sector within the Office sector is the cluster composed of offices associated with Mining, Manufacturing, Transportation, Utilities, Construction and Resource Production activities with 3,400 jobs, and the Business Services sub-sector with 3,200 jobs. Within the Manufacturing sector, the Product Assembly sub-sector employs 3,800, followed by the Processed Goods sub-sector with 2,300 employees. The Service sector has been stable since 2006 at 2,900 jobs while the Retail sector has declined by 800 jobs to 4,700 jobs.

5 Tapscott/Marshalling Yard

Tapscott Marshalling Yard is home to 9.7% or 31,000 of the total employment found in all Employment Districts. The Manufacturing sector is a major base for jobs and comprises 4 of every 10 jobs (40.5%) in this District. This sector is a strategic hub for the Processed Goods sub-sector with 5,500 jobs and the Product Assembly sub-sector with 3,900 jobs. Nevertheless, over the past five years, there has been a gradual decline in manufacturing employment, by 4,100 jobs or 24.5%. The Service sector has seen major gains in the last five years with an increase of 43.5% or 1,200 jobs, the majority of these gains have been made in the last year with an increase of 40.3% or 1,200 jobs. These gains are due to one firm in particular, which in the past year has consolidated its satellite workforce to the central location located in this District. One in every four jobs is in the Office sector, the second largest sector in the District. It declined by 1,600 jobs after years of steady growth.

6 Dufferin Keele South

Dufferin Keele South holds 24,600 jobs or 6.9% of all jobs in Employment Districts. Employment has increased for the first time in five years between 2010 and 2011 by 600 jobs (2.5%) distributed over several sub-sectors. Every sector in the District saw modest increases in employment except the Office sector, although it continues to be the largest in the District with 9,800 jobs (40.0%). The office-related employment of the Mining, Manufacturing, Transportation, Utilities, Construction and Resource Production sub-sector dominates the Office sector. The Manufacturing and Retail sectors are next in size with 5,100 and 5,000 jobs respectively. The Retail sector has seen the most significant gains in the last year, up 400 jobs or 8.9%.

7 Don Mills/East York

Don/Mills contains 22,000 jobs representing 6.2% of all Employment District jobs. Employment declined 2006-2008 and has since fluctuated

with a net loss of 18.8% or 5,100 jobs over the past five years. However, in the last year, Don Mills/East York has shown an increase in employment with 900 jobs gained. The Office sector is by far the largest sector in the district comprising of 52.4% of all employment in the District. Manufacturing is the second largest sector representing 28.3% of employment. The Office sector is dominated by the Mining, Manufacturing, Transportation, Utilities, Resource Product & Construction Office sub-sector representing 30.9% of all Office sector jobs followed by the Business Services Sector representing 23.3% of all Office sector jobs.

8 South West Scarborough

South West Scarborough contains 5.3% of the employment found in the Employment Districts with 19,000 jobs. The District has fluctuated up and down over the last five years with a net gain of 3.8% or 700 jobs. Office and Manufacturing sectors are the largest with 6,200 and 6,000 jobs respectively. The Office sector has seen the largest increase in the last year with 9.5% growth or 500 jobs. After years of steady decline, the Manufacturing sector has begun to show an increase in employment over the last two years with a 5.3% increase or 300 jobs in 2011. These gains are attributed to a new mid-sized company in the Processed Goods sub-sector.

9 Consumers Road

There are 18,100 jobs in the Consumers Road Employment District representing 5.1% of all Employment District jobs. Over the last five years this Employment District has seen a 12.4% increase in employment, a net growth of 2,000 jobs. However, in the last year 900 jobs were lost, a 4.7% decrease. Employment in the District is dominated by the Office sector with 93.1% of all employment in the District. This sector is dominated by the Business Services and the Finance, Insurance and Real Estate sub-sectors representing 26.9% and 25.4% of all Office employment respectively.

10 Duncan Mills

The Duncan Mills Employment District contains 4.9% of the employment found in the Employment Districts with 17,600 jobs. Over the last five years the District has seen a modest net increase of 100 jobs, including a loss of 300 jobs this past year. The Office sector is the dominant sector in the District comprising 74.4% of all employment. Within this sector, the Communications and Media sub-sector and the Finance, Insurance and Real Estate sub-sector dominate with 34.6% and 21.2% of the sub-sector's employment respectively.

11 Scarborough Highway 401 Corridor

This District contains 4.7% of the employment found in the Employment Districts, with 16,700 jobs, down 1,300 since 2006. Both the Office and Retail sectors declined from 2006 to 2011, by 1,500 and 400 jobs respectively. The Manufacturing sector saw an increase in employment for the first time in five years of 40.4% or 1,300 in the last year. The dominant sector in this District is Office, with 7,400 jobs. This sector has declined by 900 jobs or 10.9% in 2011. The largest sub-sectors are Communication and Media with 1,900 jobs and Business Services with 1,000 jobs.

12 West Central Scarborough

There are 15,400 jobs in West Central Scarborough in 2011, which amounts to 4.3% of the total employment within all Employment Districts. Employment has declined by 2,000 jobs or 11.5% between 2006 and 2011. The Manufacturing sector is the largest in the District with 6,600 jobs (42.9% of employment). Manufacturing employment fell by 2,500 (or 27.7%) between 2006 and 2011. Meanwhile, both the Office and Service sectors made gains over the period, of 200 jobs (5.8%) and 400 jobs (23.7%) respectively. In 2011, the Office and Service sectors stood at 3,800 and 2,300 jobs respectively.

13 North West Etobicoke

This District holds 3.6% of Employment District jobs. In the last five years, the District has experienced a decline of 1,000 jobs (7.2%). By 2011 its gradual decline in employment had halted, with the same count of 12,800 jobs as in 2010. Half of all jobs are in the Manufacturing sector with 6,400 jobs (50.0%), a decline of 1,900 jobs (23.1%) since 2006. The Office sector is a significant employer with 4,100 jobs. This sector has experienced a net gain of 1,200 jobs (40.4%) in the last year alone.

14 Steeles/Victoria Park

Steeles/Victoria Park contains 12,500 jobs or 3.5% of all employment found in Employment Districts. This District has experienced a significant loss of employment over the last five years, down 4,000 jobs or 24.1% of its 2006 total. In the last year the loss had halted, with 100 more jobs than in 2010. The majority of employment occurs in the Office sector, representing 76.1% of all jobs in the District. The primary Office sub-sector is the Finance, Insurance and Real Estate comprising 45.5% of all Office employment.

15 Liberty

Liberty is home to 2.3% of Employment District jobs. From 2006 to 2011, employment in this District has increased by 1,500 jobs (22.7%) to 8,100 jobs. Liberty's dominant employment sector is Office with 5,600 jobs or 68.6% of the total. The Office sector grew by 13% or 600 jobs last year. Business Services sub-sector represents with 3,300 jobs or 60.4% of all Office employment in the District. This sub-sector increased by 400 jobs or 13.8% in the past year.

16 Milliken

The Milliken Employment District is home to 7,400 jobs or 2.0% of all Employment District jobs. The majority of employment belongs to the Office sector, with 3,200 jobs, making up 43.2% of all jobs in the District. This

sector gained 300 jobs between 2010 and 2011 (8.9%). Between 2006 and 2011, total District employment grew by 300 jobs or 1.4%. Since 2010, every sector in the District showed an increase in employment except the Manufacturing sector which continues to decline. Between 2006 and 2011, the Manufacturing sector declined by 44.5% to 900 jobs.

17 South of Eastern

There are 4,000 jobs in this District, which amounts to 1.1% of the total employment within all Employment Districts. Over 2010, the District lost 700 jobs, a 14.9% reduction. Over the last five years, the District has lost 3,100 jobs, a 43.7% decline. The Manufacturing and Office sectors both continue to dominate with 1,900 jobs (47.5%) and 1,200 jobs respectively (30.0%). Both sectors saw a loss in employment over the past year with the Manufacturing sector decreasing by 200 jobs (9.5%) and the Office sector decreasing by 300 jobs (20.3%). The Manufacturing sector is almost exclusively represented by the Printing, Reproduction, Data Processing and Sorting sub-sector with 1,800 jobs, about 94.7% of its total employment. The Office sector is lead by the Government sub-sector with 600 jobs and the Finance, Insurance and Real Estate sub-sector with 200 jobs.

18 Weston Road/Mount Dennis

From 2006 to 2011, employment in this smaller District increased by 600 jobs (70.0%). However, between 2010 and 2011 the total number of jobs remained steady. The largest employment sector is the Service sector with 800 jobs (48.5%). The Institutional sector has now replaced Manufacturing as the second-largest sector in the district with 300 employees, growing 6.9% over the last year. Manufacturing saw a 22.3% loss of employment between 2010 and 2011 with 100 jobs lost. Much of the decline since 2006 has been in the Manufacturing and Office sectors, showing losses of 20.3% and 15.9% respectively.

19 Airport Corporate Centre

The Airport Corporate Centre is part of a much larger "Airport node" associated with Pearson International Airport, most of which is in the City of Mississauga. The District contains 1,100 employees or 0.3% of all employment found in Employment Districts. Employment increased by 300 jobs (37.5%) 2006-2011. Its top employment sector is Manufacturing with 440 jobs, which makes up 38.5 % of total employment in the District, followed closely by the Office which makes up 400 jobs (35.5%) and experienced an increase of 26.2% in the last year. The Office sector's growth is primarily in the Business Services sub-sector representing 75.0% of employment in the District. Total employment for the District has grown by 100 jobs over 2010 or by 10.0%.

20 South East Scarborough

This District contains 900 employees, 0.3% of all employment found in Employment Districts. South East Scarborough experienced a decline of 300 jobs (25.0%) 2006-2011. The number of jobs in this District has stayed below 1,000 for the third year in a row. The Manufacturing sector is by far the largest in the District with 600 jobs comprising 66.5% of the employment. The majority of the jobs are found in the Processed Goods sub-sector with 300 employees representing 52.1% of Manufacturing employment.

6. NAICS Coding

In 2011, City Planning undertook to incorporate the North American Industry Classification System (NAICS) into the data collection process of the Toronto Employment Survey. NAICS was established by Statistics Canada and the statistics agencies of Mexico and the United States to provide a coding standard that allows for data analysis and comparison across municipal, provincial, and national boundaries.

This initial attempt to provide a complete NAICS Canada 6-digit code

for each business in the City of Toronto was largely successful with 95.7% of businesses assigned a full 6-digit NAICS code. More general classifications were assigned in some of the remaining cases. By applying "bottom-up" industry coding, the data can be aggregated to higher levels during analysis and when making comparisons.

LUACs and NAICS

This new effort is in addition to the ongoing coding of occupant activity and land uses that is a key element of the Toronto Employment Survey. The Land Use Activity Code (LUAC) standard was developed by the Regional Information Systems Working Group of the Regional Planning Commissioners of Ontario and has been used consistently and updated carefully over the past 29 years. City Planning staff have adapted it over time, interpreting the codes to accommodate the evolution of the local land economy and to recognize entirely new lines of economic activity that were not identified three decades ago, while maintaining overall stability of the coding so as to enable longitudinal analysis.

LUACs and NAICS represent fundamentally different classifications of economic activity. NAICS is designed to capture supply-side "production processes" such that processes based on similar technologies are grouped together. According to Statistics Canada, it is a "supply-based, or production oriented, economic concept [to be used for] measuring productivity, unit labour costs, and capital intensity of production, estimating employment-output relationships, constructing input-output tables, and other uses that imply the analysis of production relationships in the economy".⁴ By comparison, the Land Use Activity Codes were designed to describe the overall economic activity

and to emphasize the relationship between that activity and its use of land. Thus, while the highly-detailed NAICS coding may distinguish a series of "production processes", their relationship to land use might properly be described by a more general LUAC class, and it is this latter grouping of activity that is the primary function of the LUAC coding.

The Toronto Employment Survey and NAICS identify business establishments differently, which can contribute to substantially different classifications. The Employment Survey identifies an establishment as a place of work with a distinct economic activity at a single location. NAICS identifies an establishment as "a statistical unit... defined as the most homogeneous unit of production for which the business maintains accounting records from which it is possible to assemble all the data elements required to compile the full structure of the gross value of production....[H]owever, producing units may be grouped. An establishment comprises at least one location but it can also be composed of many".⁵ In both coding systems, more than one establishment may be identified at the same location where activities can be distinguished, such as shops in a hotel. Nevertheless, the basic unit of observation may differ between the two coding systems, potentially leading to very different classifications of the activities at the same physical location.

Previous attempts to aggregate NAICS codes into LUACs were unsuccessful due to the fundamentally different coding principles. The counterpart of a given Land Use Activity Code for a particular occupant or parcel may involve many NAICS codes. It is also true that within the broad diversity of land use in the City, the production process represented by a given NAICS code on the ground may bear a relation to different LUACs

in different physical settings. A given NAICS code captures the economic activity but not necessarily its physical relationship to land and built space, which is one of the strengths of LUAC standard. By classifying an establishment by both coding standards, the City can produce two distinct yet complementary views of the economic activity within its borders.

Comparative Results

The 2011 Toronto Employment Survey resulted in the application of 316 distinct Land Use Activity Codes out of a possible 449 1- 2- and 3-digit codes. NAICS 2007 contains 2,093 2- to 6-digit codes, and 1,347 distinct instances occur in the 2011 Toronto Employment Survey.

In comparing the ten most frequently-occurring LUACs and NAICS codes in the 2011 Survey results, there is a great deal of consistency in the citywide results of the two coding standards. Both contain business activities such as restaurants, fast food outlets, law and doctors offices and cosmetic services in their most commonly used codes (see Figures 15 and 16 on Page 14). This indicates that the overall quality of data collection and classification by NAICS code is comparable to that of LUACs. However, given the differing levels of detail between the two coding systems, the number of establishments classified by each code is noticeably different.

NAICS coding has been able to provide greater detail about the composition of the predominant LUAC. Activity code 624 "Other Speciality Stores" has long been the most frequently occurring LUAC in Toronto. There are about 3,400 instances in the 2011 results. Due to its broad definition and in the changing nature of retail uses over the past 29 years, this code has increasingly been

⁴ Statistics Canada (2012) North American Industrial Classification System (NAICS) Canada 2012, at <http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2012/preface-eng.htm>, last visited May 15, 2012.

⁵ Statistics Canada (2012) North American Industrial Classification System (NAICS) Canada 2007, at <http://www.statcan.gc.ca/subjects-sujets/standard-norme/naics-scian/2007/introduction-eng.htm>, last visited May 15, 2012.

Figure 15: Top 10 LUACs

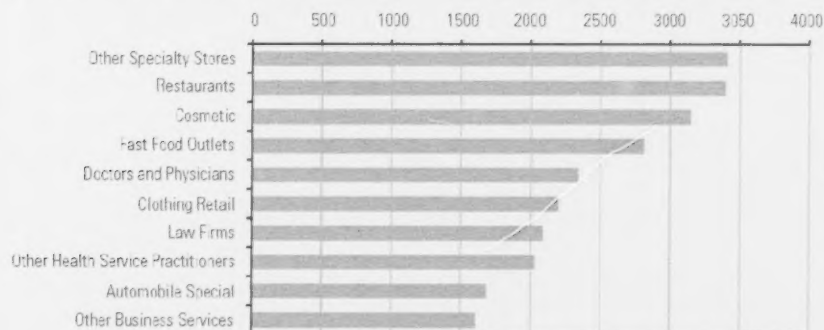


Figure 16: Top 10 NAICS Codes

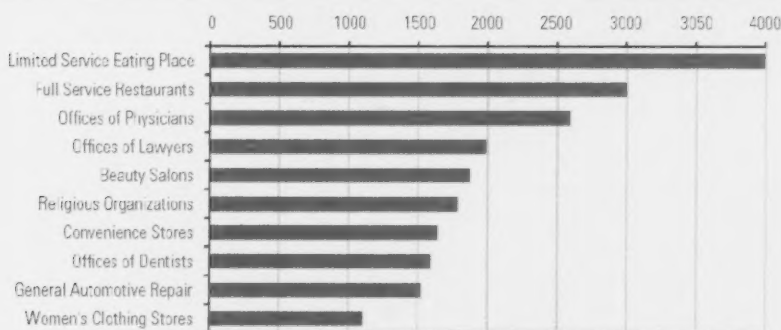
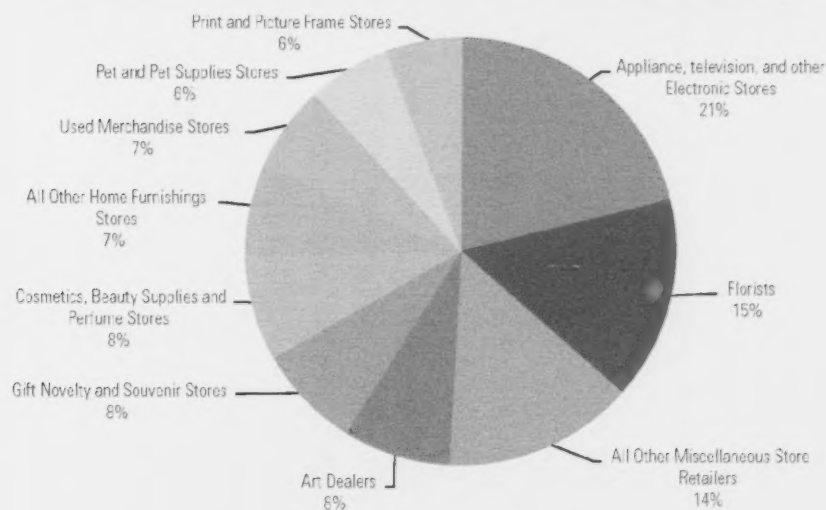


Figure 17: Top 10 NAICS Codes in LUAC 624 "Other Specialty Stores"



assigned to retail activities that defy strict classification under the current LUAC coding convention. NAICS has been able to provide a more fulsome and precise description of this type of employment activity, depicting a wide variety of product retailers (see Figure 17).

The findings suggest that there is a high level of consistency between the NAICS and LUAC coding for these types of establishments, while at the same time the NAICS codes provide a more detailed and complex portrait of employment activity in the City.

Our objective in the application of NAICS is to develop a consistency in interpretation and application that will enable longitudinal analysis, as has been achieved with LUACs. The Toronto Employment Survey employs Industrial Classification Coding System (ICCS) tools provided by Statistics Canada so that the results will be comparable to other datasets and much superior to using LUACs for this purpose. The addition of NAICS has greatly increased the comparability of our employment data with that of the new and ongoing employment survey programmes of other Ontario municipalities, while still maintaining a 29-year dataset and enhancing a municipal field survey programme now entering its thirtieth year.

How the Information on Employment is Collected by the City of Toronto

The Toronto Employment Survey has successfully marked its twenty-ninth year. Since 1983, the Survey has been conducted to monitor economic activity, provide information for policy and decision-making and offer additional context for the planning of municipal infrastructure and services. Based on the use of a consistent coding system of parcel uses and occupant activities, it provides a rich resource of time-series data for the longitudinal analysis of employment and employment activity in the City. In 2011, for the first time in the Survey's history, employment activity was classified by NAICS (North American Industry Classification System) codes. This is an addition to the occupant activity code standard of the Regional Information Systems Working Group of the Regional Planning Commissioners Ontario, which has been used and updated over the past 29 years. The use of NAICS will enable comparison of employment activity across municipalities, provinces, and other countries.

Between May and August, a team of surveyors visit all business establishments located in commercial, industrial and institutional districts and mixed use areas throughout the City of Toronto. Data collected include the number of full-time and part-time employees, the primary type of employment activity taking place, and the length of time the business has been at that location. In the case of major, multi-branch employers, the information is collected through a questionnaire mailed to the primary contact at the head office.

The result is a rich dataset which provides a valuable profile of the economic activity across the City of Toronto. This survey does not capture people who work from home, or who have "no usual place of work" e.g. contract workers, and many involved in the film industry and other activities that are not place-specific on a daily basis. These results will necessarily differ with the forthcoming results of the new voluntary National Household Survey conducted for the first time in 2011 and scheduled to be released in June 2013.

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